

ADMINISTRATION QUESTIONNAIRE

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Please note that unless you have formally retained our office via a signed agreement, no attorney-client relationship has been formed.

When a Decedent passes away without a Will, he/she/they pass away intestate. In this case, the Surrogate, or judge of the Surrogate's Court, determines who is entitled to inherit, how much they may inherit, and who is entitled to wrap up the Decedent's estate and to distribute the Decedent's assets.

* Required

A. DECEDENT'S INFORMATION

1. Legal name and any aliases: *

2. Decedent's full residence at date of death (prior to admission to hospital or hospice): *

3. Decedent's date of birth:

Example: January 7, 2019

4. Decedent's date of death: *

Example: January 7, 2019

5. Was the Decedent a U.S. Citizen at date of death? *

Mark only one oval.

Yes

No

6. Was a diligent search made to determine if the Decedent executed a Will? *

Mark only one oval.

Yes

No

7. Was the Decedent properly buried and does the proposed administrator have a copy of the paid funeral bill and death certificate? *

8. If yes, then please upload a copy of the paid funeral bill and death certificate. *

Files submitted:

B. PROPOSED ADMINISTRATORS

9. Please provide the names, addresses, phone numbers, and emails of the proposed administrator(s) of the Decedent's estate. *

10. What relationship does the proposed administrator have to the Decedent? *

11. Does any proposed administrator have a felony record? *

Mark only one oval.

Yes

No

12. If yes, please explain further.

13. If any proposed administrator is not an immediate family member, please explain why.

14. Is the proposed administrator an attorney? *

Mark only one oval.

Yes

No

15. Are all proposed administrators US Citizens? *

Mark only one oval.

Yes

No

C. DECEDENT'S FAMILY MEMBERS

16. Did the Decedent leave behind a surviving spouse? *

Mark only one oval.

Yes

No

17. Please list the name, phone number, mailing address, and email addresses of the Decedent's surviving spouse, only if he/she/they were not named previously as proposed administrator.

18. Did the Decedent sign a prenuptial agreement or marital waiver with the surviving ^{*} spouse?

Mark only one oval.

Yes

No

19. If yes, then please provide a copy of the prenuptial agreement or marital waiver.

Files submitted:

20. Did the Decedent pass away with children? ^{*}

Mark only one oval.

Yes

No

21. If yes, please list all of Decedent's children and specify whether each child is a biological child, adopted child, or stepchild.

22. If there is only one surviving child or sibling of the Decedent, please provide the name, phone, and email of at least one family friend who knew the Decedent well enough to provide a sworn statement regarding the Decedent's family relationships *and who is not listed in the Will.*

23. Did any child of the Decedent pass away before the Decedent? *

Mark only one oval.

Yes

No

24. If yes, did such predeceased child have children who would be the Decedent's grandchildren?

Mark only one oval.

Yes

No

25. If yes, then please list the names and dates of birth of these grandchildren.

26. Who are the Decedent's parents and are they living or deceased? **(Only answer if there are no persons listed earlier in this Section.)**

27. Who are the Decedent's siblings and their children, only if the siblings children predeceased the Decedent. **(Only answer if there are no persons listed earlier in this Section.)**

28. Who are the Decedent's grandparents and are they living or deceased (including the Decedent's maternal and paternal lines)? **(Only answer if there are no persons listed earlier in this Section.)**

29. Who are the Decedent's aunts and uncles (including their children only if the aunts and uncles have predeceased the Decedent)? **(Only answer if there are no persons listed earlier in this Section.)**

30. Who are the first cousins and first cousins once removed (children of the first cousins) of the Decedent, only if the first cousins predeceased the Decedent? **(Only answer if there are no persons listed earlier in this Section.)**

31. Did the Decedent pass away with a safe deposit box?

32. Do you anticipate that any relative of the Decedent will object to the appointment of the proposed administrator? *

Mark only one oval.

Yes

No

33. If yes, then please explain why.

34. Did the Decedent have relatives who are alive yet who can not be found? *

Mark only one oval.

Yes

No

35. If yes, then please explain below:

36. Are any of the Decedent's relatives under age 18, mentally incapacitated, under a *
guardianship, or imprisoned?

Mark only one oval.

Yes

No

37. If yes, then please explain below.

D. DECEDENT'S ASSETS

38. **REAL ESTATE** *
Did the Decedent pass away with real property?

Mark only one oval.

Yes

No

39. If yes, then please provide all information regarding each property owned by the Decedent including: a) property type (co-op, condo, detached or semi detached residence); b) property address; c) any and all additional owners; and d) estimated fair market value of the property.

40. If any real property is an investment or rental property, **and such property is owned solely by the Decedent**, please calculate the amount of eighteen (18) months rent on such property.

41. Please provide ownership documents for each property listed above - property document #1.

Files submitted:

42. Please provide ownership documents for each property listed above - property document #2.

Files submitted:

43. Please provide ownership documents for each property listed above - property document #3.

Files submitted:

44. Is there a mortgage on any of the Decedent's properties? *

Mark only one oval.

Yes

No

45. If yes, then please list approximate amount of mortgage remaining on each property.

46. Did the Decedent pass away with a pending cause of action (lawsuit) for which this administration proceeding is required? *

Mark only one oval.

Yes

No

47. If yes, please describe the cause of action.

48. Did Decedent own any unimproved real property (lots or acres of land)? *

Mark only one oval.

Yes

No

49. If yes, please describe the Decedent's unimproved land and its approximate value.

50. **RETIREMENT ACCOUNTS (IRAs, pension plans, etc.) ***

Did the Decedent have any retirement accounts?

Mark only one oval.

Yes

No

51. If yes, then please provide all information for each account including a) account type; b) where the account is held; c) any additional owners on the account; d) estimated value of the account; and e) primary and contingent beneficiaries.

52. LIFE INSURANCE POLICIES *

Did the Decedent have any life insurance policies in place?

Mark only one oval.

Yes

No

53. If yes, then for each of the Decedent's life insurance policies, please provide: a) account type (term, whole life, etc.); b) where the policy is held; c) policy premium; and d) primary and contingent beneficiaries.

54. SAVINGS / CHECKING / PAY ON DEATH ACCOUNTS *

Did the Decedent pass away with any of the above accounts?

Mark only one oval.

Yes

No

55. For each of the Decedent's savings and checking or pay on death accounts, please list: a) account type; b) where the account is held; c) additional owners on the account; d) estimated value of each account; and e) account beneficiaries.

56. **BROKERAGE / INVESTMENT ACCOUNTS**

*

Did the Decedent own any brokerage or investment accounts or stocks and bonds?

Mark only one oval.

Yes

No

57. If yes, then please provide the following information for each account that the Decedent held: a) account type; b) where the account is held; c) additional owners of the account; d) estimated value of each account; and e) primary and contingent beneficiaries.

58. Did the Decedent have a financial planner?

Mark only one oval.

Yes

No

59. If yes, please provide name and email of the Decedent's financial adviser/planner:

60. **DECEDENT'S BUSINESS INTERESTS** *

Did the Decedent own any business or equity in a business?

Mark only one oval.

Yes

No

61. If yes, for each business of the Decedent, please provide: a) company name; b) state of formation / incorporation; c) business type (corporation, LLC etc.); and d) other members or shareholders.

62. Please provide all formation documents for Decedent's business -- Formation Document #1

Files submitted:

63. Please provide all formation documents for Decedent's business -- Formation Document #2

Files submitted:

64. Please provide all formation documents for Decedent's business -- Formation Document #3

Files submitted:

65. **INTELLECTUAL PROPERTY / COPYRIGHTS / PATENTS**

*

Did the Decedent own any intellectual property, including copyrights, patents or royalties?

Mark only one oval.

Yes

No

66. If yes, then please describe each items of the Decedent's intellectual property, whether it is owned with others, and the approximate value.

67. **ALL OTHER ASSETS**

In the following section, please list all other assets owned by the Decedent. Such assets may include vehicles, artwork, jewelry, rare books, valuables, and coins, etc. Be sure to describe each asset, its value, and where the asset is held.

68. **DECEDENT'S DEBTS**

*

Did the Decedent have any liabilities or debts?

Mark only one oval.

- Yes
- No

69. If yes, then for each liability or debt of the Decedent, please provide information regarding: a) debt type; b) where the debt is held; c) debt amount; and d) and whether the debt is owed with others.

**E.
ADDITIONAL
INFORMATION
SECTION**

In this last but important section, please answer the questions below and upload all relevant documents on behalf of the Decedent. You may use this section to upload additional documents that you were unable to upload previously. If it is easier for you to forward us copies of documents via email, please feel free to do so.

We treat each administration proceeding with the attention and dedication it deserves. Although we endeavor to make this probate questionnaire as exhaustive yet navigable as possible, there might be issues that it has not addressed. Therefore, please use this section to provide all additional information regarding this administration proceeding.

70. Please use this section to provide us with any additional information or to upload any additional documents that are pertinent to this administration matter.

71. Please upload any additional documents - additional document #1.

Files submitted:

72. Please upload any additional documents - additional document #2.

Files submitted:

73. Please upload any additional documents - additional document #3.

Files submitted:

74. Please upload any additional documents - additional document #4.

Files submitted:

75. Please upload any additional documents - additional document #5.

Files submitted:

We look forward to working with you on your administration matter and consider it a tremendous privilege to do so.

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